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TALENT HUB Supporting Copenhagen Capacity to strengthen retention and EU-Mobility of skilled migrants through collaborative multi-country coordination on talent retention and circulation in the EU

POLICY BRIEF: EMBRACING THE POTENTIAL OF DIGITAL NOMADS – RECOMMENDATIONS

This policy brief has been produced under the project "Talent Hub: Supporting Copenhagen Capacity to strengthen retention and EU-mobility of skilled migrants through collaborative multi-country coordination on talent retention and circulation in the EU". The Talent Hub project is implemented by the IOM offices in Denmark and Germany in cooperation with Copenhagen Capacity and the European Commission Directorate-General for Structural Reform Support (DG REFORM).

The brief has been developed as part of a series of products under the Talent Hub project. It is accompanied by the separate overview document, "Digital Nomad Policies in the European Context" that explores digital nomad visa programmes, requirements and restrictions in selected countries.

The recommendations at the end of the document are formally presented to Copenhagen Capacity as an inspirational catalogue for change in Copenhagen Capacity's future work on enhancing retention in Denmark.

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HIGHLIGHTS

- Despite the increase of digital nomad visas in the EU since 2020, there is a **widespread lack of official data about the phenomenon of 'digital nomads'**. However, there is simultaneously an increased recognition of the potential of digital nomadism to **positively contribute to local economies**.

- Digital nomads are **highly educated professionals** and contribute to local economies through direct spending on goods and services. They bring **valuable skill sets that can foster local growth** but concerns about gentrification and rising costs in host destinations need further investigation.

- Destination choices hinge on several factors, often aligning with those attracting tourists. To harness the economic potential of digital nomads, **policymakers can adopt strategies varying from legislative action to place branding** and **community-building initiatives**.

INTRODUCTION

Within the employment sector, 'digital nomads' are redefining traditional employment structures. The term 'digital nomad' refers to professionals who are not tied to a specific work location, thus instead relying heavily on Information and Communication Technology (ICT) to perform their job tasks while frequently travelling to various places.[1] They differ from other categories of remote workers such as *home-based workers* or *occasional remote workers,* as both modes of work are not characterised by regular travel arrangements. While limited availability of official data challenges the ability to better quantify or measure the phenomenon of 'digital nomadism', digital nomads are a rapidly growing workforce. Their high degree of mobility makes digital nomads a category of professionals highly contended by

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[1] Cook, D. 2023, What is a digital nomad? Definition and taxonomy in the era of mainstream remote work, https://doi.org/10.1080/16078055.2023.2190608

countries and regions around the world, including within the EU. Since 2020, a total of 12 European Member States have introduced digital nomad visas[2] to attract such workers to their territories, as well as the two European Free Trade Agreement (EFTA) countries Iceland[3] and Norway[4] (Svalbard). Indeed, Iceland and Norway are currently implementing similar programmes.

This policy brief delves into the key aspects of digital nomadism, by focusing on digital nomads' motivations, economic contributions, and impact on local communities. The brief also examines strategies to attract and retain digital nomads, from nomad-specific visa programs to marketing initiatives presenting also key recommendations on strengthening data collection, efforts on raising awareness among employers and promoting exchange between local communities and digital nomads. As these highly mobile professionals become increasingly widespread through countries introducing DNVs (please refer to VisaGuide), harnessing their potential presents a significant opportunity for economic growth and development.

WHO ARE DIGITAL NOMADS?

Due to the limited availability of official data, it is challenging to quantify the exact number of individuals who adopt this type of lifestyle. Nevertheless, initial estimations in the United States suggest that approximately 17.3 million workers from the United States identify themselves as digital nomads.[5] While sociodemographic information regarding digital nomads is scarce, available information on the profile of these highly mobile professionals shows that digital nomads are highly educated.[6] The majority of them mainly work within the IT sector[7] followed by IT-related professions[8] such as software developers, startup-founders or marketing professionals as well as in creative, education and training services.
According to CEDEFOP (European Centre for the Development of Vocational Training), the IT sector in

Europe is expected to witness large employment growth in the next years,[9] with countries such as Denmark and Germany looking to an increased demand of ICT professionals. In Czechia, one of the main drivers for the introduction of a digital nomad visa was facilitating the development of IT environments within the country.

Eligibility criteria as well as benefits enjoyed under the various digital nomad visas vary across EU Member States. For instance, while in Czechia the digital nomad visa is targeted at science, technology, engineering, and mathematics (STEM) graduates and IT professionals, this is not the case in other Member States presenting similar programmes. In terms of benefits, only in Spain[10] and Portugal[11] nomads can enjoy limited taxation, while in Spain and Estonia[12] holders of a digital nomad visa are also allowed to engage in working agreements with local clients under certain conditions.[13] However, some universal requirements to obtain digital nomad status across the relevant Member States are a valid passport, proof of financial means, work contract (or client contract), clean criminal records and a valid health insurance.

Digital nomads contribute to local economies mostly through direct expenditures on goods and services such as accommodation, food, and transportation, among others. In Malta, authorities found that the average salary of digital nomads is EUR 84,000 with an average monthly expenditure of EUR 2,800.[14] In Madeira, Portugal, their estimated monthly expenditure amounts to EUR 1,800.[15] However, their skillset can also be leveraged to promote growth of local actors through knowledge sharing, mentoring and other community programmes.[16] According to the **'Remote Work & Digital Nomads'** survey carried out by IOM in Denmark and Germany in November 2023, 60 per cent of the 68 respondents surveyed found that digital nomads mainly contribute to the local economies through innovation and skills exchange, followed by addressing skills shortages (59%)

[2] Croatia Jan 2021. Cyprus (Oct 2021), Czech Republic (Jul 2023), Estonia (Aug 2020), Greece (Sep 2021), Hungary (Feb 2022), Italy (the legislative bill was adopted in January 2022, however an enacting decree has not been introduced yet), Latvia (Feb 2022), Malta (Jun 2021), Portugal (Oct 2022), Romania (Dec 2021), Spain (Jun 2023)
[3] Iceland 2023. Long-term visa for remote work (Directorate of Immigration)
[4] Citizen Remote 2023. Norway Digital Nomad Visa (Svalbard). 24 May, available at: https://citizenremote.com/visas/norway-digital-nomad-visa/
[5] MBO 2023. State of Independence: Nomadism Enters the Mainstream. Available at: https://www.mbopartners.com/state-of-independence/digital-nomads/
[6] Nomad List estimates that digital nomads are highly educated (with 88% having at least a bachelor or masters' degree)
[7] NomadList 2023. The 2023 State of Digital Nomads. Available at: https://nomadlist.com/digital-nomad-statistics
[8] MBO 2023. State of Independence: Nomadism Enters the Mainstream. Available at: https://www.mbopartners.com/state-of-independence/digital-nomads/
[9] Cedefop, Future Employment Growth, Skills Intelligence database (accessed 27 September 2023)
[10] Balcells 2023. Digital Nomad Visa in Spain: a Complete Guide
[11] Immigrant Invest, Portugal Digital Nomad Visa Guide for 2023: Requirements and Costs (2023).
[12] Visit Estonia, FAQ: Estonia's Digital Nomad Visa (2020). Available at: https://www.visitestonia.com/en/digitalnomad/faqs
[13] In Spain, holders of the digital nomad visa can earn up to 20 per cent of their income from work with Spanish clients. Similarly, in Estonia digital nomads can have local clients as long as their main source of income is work for a foreign-based client. Rosie Frost: Spain has launched a Digital Nomad Visa - here's everything you need to know before you apply, *Euronews*. 30 January 2023. Available at: euronews.com
[14] Mizzi, C. 2023. CEO of Residency MaltaAgency. BizNews Interview with Charles Mizzi, CEO of Residency Malta Agency. Available at: https://biz-news.biz/an-excellent-location-to-set-up-residency-centrally-located-fabulous-weather-english-speaking/
[15] Why Europe is a great place for digital nomads (2021) *The Economist*, 2 October. Available at: https://www.economist.com/europe/2021/10/02/why-europe-is-a-great-place-for-digital-nomads
[16] Faramarzi, S., Norton, J. 2023. Exploring the Impact of Nomads on Local Communities. Plumia, 4 February. Available at: https://plumia.org/exploring-the-impact-of-nomads-on-local-communities/

and facilitating cultural exchanges (43%).[17] Furthermore, the respondents reported that factors such as the reduction of temporary skills gaps (54%), creation of a more diverse workforce (46%) and increased networking opportunities (45%) are perceived as direct benefits for their organisations if engaging with digital nomads.

Remote Work & Digital Nomads survey – Addressing talent attraction, mobility and retention

The *'Remote Work & Digital Nomads'* survey was carried out in the context of the Talent Hub EU project that is implemented by IOM in Denmark and IOM Germany together with the European Commission's Directorate-General for Structural Reform Support (DG Reform) and Copenhagen Capacity (CopCap). The project aims at enhancing the retention and mobility of skilled migrants within the EU through coordinated efforts in talent circulation, including via technical support to develop strategies related to talent retention, attraction, and nurturing. In this context, the survey was rolled out to better understand the evolving landscape of remote work and its potential to improve talent attraction, mobility, and retention within the EU with a specific focus on remote work, cross-border remote work and digital nomadism. In total, 68 respondents participated in the online survey, of which 49 responded as employees (72% of all respondents), and 19 as employers (28% of all respondents), from different locations within the EU. The respondents represented the private, public, and non-profit sector. Out of 68 respondents, 40 respondents indicated that their organisation operates in Spain, followed by 29 respondents indicating France.[18] The limited survey was not intended to provide statistically representative results but rather background and direction for the present document.

Nevertheless, some concerns are mounting on the possible negative effects of digital nomadism on their selected work-and-travel destinations. Gentrification and increased prices of goods and services may crowd locals of affordable destinations out of certain areas or services.[19]

However, the increase of nomad-specific visas and programmes, as well as growth rate estimates of the adoption of this work-lifestyle (particularly in the post-pandemic era) point to a recognition that digital nomadism is an increasing trend and that it can benefit economies and societies, with policymakers intended to make the most out of it.

WHAT DO DIGITAL NOMADS LOOK FOR?

Digital nomads consider a range of points before deciding the next destination of work. According to a study conducted by the United Nations Development Programme (UNDP) in 2020, factors such as mentality of the local people, local culture, attractions, internet speed, cost of life and safety are crucial aspects taken into account in their migration intentions.[20] In addition, other factors may also play a crucial role in determining the digital nomad's decision to migrate, such as infrastructure, housing opportunities (accommodation), transportation costs, climate and weather conditions, level of bureaucracy and corruption, presence of an international community, events and nightlife as well as food choices.[21] Table 1 below presents the scores of selected areas based on votes provided by digital nomads in Berlin and Copenhagen in 2023.

TABLE 1. Scores in selected areas by digital nomads in Berlin and Copenhagen, 2023

	Berlin	Copenhagen
Positive reviews by digital nomads	**90%**	**67%**
Friendly to foreigners	5/5 - Great	5/5 - Great
Fun	5/5 - Great	5/5 - Great
Internet (speed)	5/5 - Great	5/5 - Great
Cost of living	2/5 - Pricey	1/5 - Way too expensive
Safety	5/5 - Great	5/5 - Great

Data Source: NomadList website - Berlin for Digital Nomads, Copenhagen for Digital Nomads, 2023

*Note: Nomad List is an information software and online community for digital nomads and remote workers with more than 30,000 members. The scores and percentages presented in table 1 are based on the total number of community members, which is estimated to be around 30,000. The number of community members can be subject to change.

Factors that make locations attractive to digital nomads are akin to those that make popular tourist destinations; thus the tourism industry can be seen as a support in the attraction of digital nomads.[22] While large cities

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[17] A total of 68 respondents participated in the Remote work and Digital Nomads survey rolled out under the Talent Hub Project. Forty- nine of them were employees, and 19 of them employers all based across the EU Members States.
[18] Selection of more than one EU MS was possible in survey.
[19] Joshua Askew: 'People are really fired up': Digital nomads blamed for Portugal's high prices and housing crisis, *Euronews*, 12 May 2023. Available at: euronews.com
[20] UNDP 2020. Digital Nomad Scanner - Who are the location independent digital professionals that choose Belgrade. Available at: https://www.undp.org/serbia/publications/digital-nomads-scanner
[21] ibid
[22] Bloomberg 2023. The Line Is Blurring Between Remote Workers and Tourists. Available at: How Cities Can Transform Digital Nomads Into Permanent Residents - Bloomberg

and digital hubs in the EU such as Berlin, Paris, Lisbon, Barcelona, and Amsterdam represent some of the most visited areas, other countries that are growing tourist destinations such as Indonesia and Thailand, Vietnam, Malaysia, and Uruguay are also growing in popularity among these highly mobile professionals.[23]

Digital nomads can also potentially affect the repopulation of remote areas positively in terms of growth. For example, the municipality of Loulé in Portugal is supporting initiatives aiming at attracting digital nomads to its inland areas to promote territorial development.[24] Indeed, they can represent a potential catalyst for rural development, injecting economic resources by actively supporting local businesses and services. Their presence can also counteract population decline, contributing to community growth and resilience, taking into account the potential negative impact on the local population as previously mentioned. As highly skilled individuals, digital nomads can leverage their skills engaging in collaborative initiatives fostering innovation and entrepreneurship in underserved rural areas. Further, serving as ambassadors, they can play a crucial role in highlighting the distinctive aspects of rural living, acting as magnets for others seeking the unique experiences and opportunities these regions can provide.

EMBRACING NOMADIC TALENT – PROS AND CONS

Digital nomadism is a severely unexplored phenomenon in the realm of public policy as a vast majority of the current research on the subject stems from the organisational management and tourism literature. To divert this trend, it is paramount to improve data collection. To design regulations, marketing campaigns and accompany local stakeholders in growing awareness of the potential opportunities and challenges of digital nomadism for their ecosystems, policymakers should ensure that the interventions designed are backed by rigorous evidence.

Positive spillovers in terms of **economic contribution, skills**, **tackling labour shortages** and **territorial development** make digital nomads sought-after targets by both private and public stakeholders. Depending on national setup and intentions, DNVs have been implemented by states to boost the post-pandemic economy in terms of **tax revenue** and **social contributions** as well as development, financial contributions, and **innovation** also in regions and cities outside main economic and industrial centres. The introduction of DNVs or similar options can also be considered to have regularized and embraced an already existing lifestyle and modality of work for especially digital professionals.

While considering the potentially positive effects of DNVs and similar options, also possibly **negative effects,** and mitigation of same should be considered. Digital nomads with favourable tax conditions can lead to **pressure on the local labour market** especially if allowed to enter business arrangements with domestic customers. The arrival of foreign specialists could also result in increased price levels and **gentrification** of the same areas whose economy and infrastructure they were supposed to boost.

RECOMMENDATIONS

The following section contains possible areas of interventions that governments, regions, and municipalities could take to become more attractive to these highly mobile professionals. The interventions focus mainly on Denmark and Germany given the Talent Hub project's primary focus areas, however, as the interventions relate to broader thematic areas, they may be relevant and applicable in other EU or European contexts as well.

The final recommendations are formally presented to Copenhagen Capacity as an inspirational catalogue for change in Copenhagen Capacity's future work on enhancing retention in Denmark.

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[23] NomadList 2023. Fastest growing remote work hubs of 2023. Available at: https://nomadlist.com/fastest-growing-remote-work-hubs
[24] Rural Digital Nomads. Available at: https://www.ruraldigitalnomads.com/

INCREASE DATA COLLECTION EFFORTS

Endorse more efforts in the collection, the harmonisation and publication of data on digital nomads in the EU	Relevant for Denmark	Relevant for Germany
	√	√

Recommendation:

- Stakeholders at European/EU level could endorse the harmonisation and publication of available data concerning digital nomad specific programmes implemented by EU Member States. Via existing working groups or the creation of a dedicated working group, the EU could ensure relevance and comparability to properly assess the rights, opportunities and challenges related to digital nomadism in the EU. Countries who have implemented digital nomad visas already possess necessary information to start with evaluating main aspects of such initiatives. Applicants for digital nomad visas must provide proof of income and identification documents, sometimes accompanied by proof of accommodation and a CV, information that can help drawing a better picture of who digital nomads in EU Member States are, their occupations and preferred locations.

Rationale:

- There is a clear and substantial need to improve the availability of official data concerning digital nomadism in the EU for an informed discussion on both benefits and disadvantages. From quantifying the uptake of digital nomad visas, to improving our understanding about the impact of digital nomads on local economies or better identifying potential needs of this target group, more data is needed for evidence-based policymaking.

Relevant actors:

- The European Commission as the technical and executive body of the European Union is particularly well placed to create a dedicated working group (or integrate into an existing one) harmonisation and disclosure of digital nomad data across the EU in cooperation with its Member States. In particular, Eurostat, the statistical office of the European Union, could support the working table through collection of comprehensive data on digital nomadism in the European Union, including but not limited to total numbers, current and expanding sectors, contributions to local economy etc.
- Member States interested in introducing a digital nomad visa could endorse more data collection efforts at the European level to promote exchange of knowledge and best practices.

IMPLEMENT NOMAD-SPECIFIC PROGRAMMES

Consider the advantages and disadvantages of introducing digital nomad visas	Relevant for Denmark	Relevant for Germany
	√	√

Recommendation::

- Countries that have not already implemented a digital nomad visa are encouraged to consider the advantages and disadvantages of introducing such a policy adapted to the country-specific context. Nomad-specific programmes grant a clear legal status to digital nomads who often use tourist visas, meaning they are not formally allowed to perform work. In this respect, a digital nomad visa would grant such individuals a clear legal status. Status is of key importance as it clearly defines and regulates entitlements and obligations that span different jurisdictions. This requires accurate, timely and transparent information on requirements and implications. According to a recent survey of 1,200 digital nomads, 76.5 per cent found that digital nomad visas bring benefits and that existing schemes could be improved.[25]
- The advantages should however be weighed against potential disadvantages such as gentrification and increased prices, and measures considered to mitigate any adverse effects.

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[25] Flatio 2023. Digital Nomad Report 2023. Available at: https://www.flatio.com/blog/flatio-launches-its-first-digital-nomad-report-2023

> **Rationale:**
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> - Digital nomad visas can avoid misuse of other visa categories and offer clear rights and incentives, both economic (consider tax breaks and possibility to work for local employers) and normative (time cumulation towards permanent residency/citizenship) such as in Spain and Portugal, at the forefront of these initiatives.
> - In Estonia and Spain, visas allow nomads to engage in work with local firms, facilitating knowledge exchange, easing labour shortages, and promoting retention.
> - In the **'Remote Work & Digital Nomads'** survey conducted by IOM (November 2023), respondents identified uncertainty about employment and immigration requirements as the main challenge in engaging a work agreement with a digital nomad. This could be addressed by the introduction of a clear policy targeted at digital nomads.

> **Relevant actors:**
>
> - National decision makers supported by national agencies competent on migration affairs such as the Danish Agency for International Recruitment and Integration (SIRI) and the German Federal Office for Migration and Refugees (BAMF), could consider promoting action towards the introduction of digital nomad visas.

MARKETING INITIATIVES TO PROMOTE DESTINATIONS

Build campaigns and initiatives to promote locations as destinations for digital nomads	Relevant for Denmark	Relevant for Germany
	√	√

> **Recommendation:**
>
> - Both national and local authorities (such as territorial development agencies) could introduce marketing initiatives that leverage the unique strengths of their territories to differentiate themselves from the competition in attracting digital nomads. Websites and portals targeting digital nomads that provide clear and comprehensive information on visa application and settling in upon arrival can facilitate relocation efforts and boost attractiveness, as in Andalusia (Spain),[26] Croatia,[27] Greece[28] and Malta.[29]

> **Rationale:**
>
> - Campaigns and narratives to establish a location as a digital nomad destination are essential to put a territory on the 'nomad radar', particularly for regions and municipalities that may be less known with respect to the tourism or business ecosystem they can offer. Non-urban areas can offer a slower lifestyle and natural landscapes and while large cities can stress their high-quality internet connection,[30] growing digital and technology hubs, events, and a rich cultural lifestyle. It is important to know one's strengths, for instance, Scandinavian regions and cities like Copenhagen can promote their high levels of safety as well as a high degree of trust and tolerance,[31] creating a welcoming environment.

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[26] Digital Nomads Andalucia. Available at: https://www.andalucia.org/en/digitalnomads?utm_source=search&utm_medium=paid_search&utm_campaign=NOMADAS-DIGITALES&utm_term=tactica3&utm_content=&tc_adq=

[27] Croatia, your new office. Available at: https://croatia.hr/en-gb/useful-information/digital-nomads

[28] Work from Greece. Available at: https://workfromgreece.gr/

[29] Malta for Nomads. Available at: https://nomad.residencymalta.gov.mt/malta-for-nomads/

[30] European Commission 2023. Digital Economy and Society Index (DESI) 2022

[31] Ortiz-Ospina, E., Roser, M. (2016) - "Trust". Published online at OurWorldInData.org. Retrieved from: 'https://ourworldindata.org/trust'

Relevant actors:

- Public authorities involved in the promotion of tourism, cultural activities, and regional authorities such as territorial development agencies in both Denmark and Germany are particularly well placed to assess the unique features of their respective regions that can be leveraged in marketing campaigns to attract regional nomads.

SUPPORT LOCAL INITIATIVES

Support bridging initiatives between digital nomads and local communities	Relevant for Denmark	Relevant for Germany
	√	√

Recommendation:

- Through funding or administrative support, local authorities can encourage activities that aim to connect local communities and digital nomads, such as volunteering with local associations or workshop activities with schools or local firms that can facilitate skills exchange as well as knowledge of the cultural and social fabric. Further, supporting the creation of coworking spaces (or the re-adaptation of old spaces to coworking facilities) contribute towards the creation of feelings of community and community spaces that highly mobile professionals seek for when travelling.[32]

Rationale:

- Feeling of loneliness and disconnectedness are common struggles among digital nomads. According to results from the **'Remote Work & Digital Nomads'** survey conducted by IOM (November 2023), the increased feeling of isolation was identified as the main struggle of remote work by the employee respondents participating in the survey, with 60 per cent among them reporting it as a challenge of remote work arrangements. While travelling, digital nomads seek to make social encounters with like-minded individuals as well as the local population.

- Physical coworking spaces can provide nomads both efficient working environments and opportunities for social interaction with similar professionals, boosting the attractiveness of locations. Similarly, initiatives involving nomads and local populations can make for a more authentic stay in destination countries, potentially promoting retention.

Relevant actors:

- Local stakeholders, including municipalities and civil society organisations that are embedded in the local social fabric, are considered as the most adept actors for assessing opportunities and needs in establishing community-building and cultural exchange programs between digital nomads and the local population. Their intimate knowledge of the community dynamics positions them as key contributors in shaping initiatives that foster meaningful connections and collaborations between digital nomads and residents. This engagement is vital for ensuring that such programs align with the unique characteristics and aspirations of the local context, promoting a fruitful relationship between the transient digital nomad community and the permanent local population.

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[32] Lee, A., Toombs, A. L., Erickson, I., Nemer, D., Ho, Y. S., Jo, E., & Guo, Z. 2019. The social infrastructure of co-spaces: Home, work, and sociable places for digital nomads. *Proceedings of the ACM on human-computer interaction*, *3*(CSCW), 1-23.

SUPPORT FIRMS IN EMBRACING NOMADIC TALENT

Support firms/companies in welcoming digital nomad talents by raising awareness on the phenomenon	Relevant for Denmark	Relevant for Germany
	√	√

Recommendation:

- Authorities that have close ties with the local economic fabric such as regional business associations should endorse campaigns spreading knowledge about digital nomads, promoting their skills and countering stereotypes in order to bring firms closer to these professional figures and raise awareness about this growing talent pool.

Rationale:

- Digital nomadism is a growing trend, yet available information on these professionals is limited, leaving employers with several doubts with respect to the skills and attitude of these workers. For instance, Digital nomads often work in shortage occupations and invest more time in their skills development compared to traditional employees. In the last year, 73 per cent of digital nomads, in contrast to 53 per cent of those who are not digital nomads, have engaged in training related to their work. Furthermore, 68 per cent of digital nomads, as opposed to 47 per cent of non-digital nomads, indicate that their occupations demand specialised training, education, or expertise.[33]

Relevant actors:

- Chambers of commerce, industry associations and economic development organisations are among the stakeholders that can assess the potential contribution of digital nomad talents to the local economic ecosystems. Their in-depth understanding of the challenges and characteristics of local businesses uniquely position them to effectively guide these enterprises in navigating the dynamic landscape of digital nomadism within the EU. Their insightful vantage point equips these stakeholders to provide adequate and tailored support.

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[33] MBO 2023. State of Independence: Nomadism Enters the Mainstream. Available at: https://www.mbopartners.com/state-of-independence/digital-nomads/

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